

**Equipment Purchase Authorization
UDC Proposal
(Revised October 9, 2000)**

**Current Process
(Bundled Service to DA)**

Exchange of Forms

- If applicable, the EPA is sent by the UDC to the Load Serving (LS) ESP with the EMI.
- The signed EPA form is required during the timeframe the MDCR is sent to the UDC. The MDCR identifies pending ownership/intent to purchase.
- The MIRN is submitted 3 working days after the exchange.

Switch of equipment ownership

- **APS** – If the MSP does not find the installed equipment to be acceptable, APS requires the MSP to pull off the job and contact APS.
- **TEP** - If the MSP does not find the installed equipment to be acceptable, TEP requires the MSP to pull off the job and contact TEP.
- **SRP** –
If the meter is not being exchanged – SRP requires the MSP to tag the meter, with the SRP assigned meter number, at least 10 working days prior to the switch/read date. At that time, if the MSP finds that the equipment is not acceptable, the MSP is to pull off the job and contact SRP and not tag the meter.

If there is a meter being exchanged and the MSP does not find the installed equipment acceptable, SRP requires the MSP to pull off the job and contact SRP.
- **Cooperatives** - If there is a meter being exchanged and the MSP does not find the installed equipment acceptable, the Cooperative requires the MSP to pull off the job and contact the Cooperative.

Proposal (Bundled Service to DA)

Exchange of Forms

- If applicable, the EPA is sent by the UDC to the Load Serving (LS) ESP with the EMI.
- The MSP submits the MDCR with scheduling information to the UDC no later than 5 working days before the exchange.

Note: The MDCR has been modified to exclude all pending ownership fields. The ESP will confirm ownership directly with the UDC. (See modified MDCR handout)

- The ESP sends the UN-signed EPA form back to the UDC no later than 5 working days before the exchange. This will be considered intent *to purchase the equipment*. If the Unsigned Intent to Purchase EPA is not received 5 days before the exchange, the UDC will handle this as an exception and not allow the exchange to take place. The expectation is that Intent to Purchase EPA is submitted regardless if equipment is being purchased or not.

Note: The EPA form has been modified to allow the Purchaser to identify which piece of equipment is being purchased. (See modified EPA handout)

- The signed EPA form must be returned to the UDC within 5 working days of the exchange.

The assumption is the ESP will receive the MIRN the same time that the UDC receives the form. Since the MIRN is required within 3 working days of the exchange, the ESP has 2 additional working days to confirm equipment ownership and submit the signed EPA via fax or mail.

Note: *The UDCs may add additional language to Service Agreements, Tariffs, Protocols or Articles to protect the UDC during the time the exchange is complete and the actual signed EPA is received by the UDC.*

Switch of equipment ownership

- **APS** – If the MSP does not find the installed equipment to be acceptable, APS requires the MSP to pull off the job and contact APS.
- **TEP** - If the MSP does not find the installed equipment to be acceptable, TEP requires the MSP to pull off the job and contact TEP.

- **SRP –**

If the meter is not being exchanged – SRP requires the MSP to tag the meter, with the SRP assigned meter number, at least 10 working days prior to the switch/read date. At that time, if the MSP finds that the equipment is not acceptable, the MSP is to pull off the job and contact SRP and not tag the meter.

If there is a meter being exchanged and the MSP does not find the installed equipment acceptable, SRP requires the MSP to pull off the job and contact SRP.

- **Cooperatives** - If there is a meter being exchanged and the MSP does not find the installed equipment acceptable, the Cooperative requires the MSP to pull off the job and contact the Cooperative.

Proposal (DA to Bundled Service)

Exchange of Forms

- The ESP will submit the EPA to the UDC within 5 working days of the submitting the TS or Disconnect 814 DASR
- The MDCR is submitted by the UDC to the ESP no later than 5 working days before the exchange.
- The UDC sends the UN-signed EPA form back to the ESP no later than 5 working days before the exchange. This will be considered intent *to purchase the equipment*. The expectation is that Intent to Purchase EPA is submitted regardless if equipment is being purchased or not.

Note: The EPA form has been modified to allow the Purchaser to identify which piece of equipment is being purchased. (See modified EPA handout)

- The signed EPA form must be returned to the ESP within 5 working days of the exchange.

Switch of equipment ownership

At the discretion of the UDC, the meter exchange will either take place or they will back off the job and contact the ESP for coordination of work and notification. If the UDCs back off the job, the normal re-scheduling requirement via the MDCR will apply.

Issues:

If customer coming back to Bundled owns the equipment, the ESP, UDC and the customer will coordinate the exchange the EPA and the disclaimer on a case by case basis.